

HOTEL yearbook 2012

Scenarios for the year ahead

Choice CEO Stephen Joyce :
Ideas, insights – and wishes – for 2012

Is your hotel ready for the Chinese?

The 2012 outlook for key hotel markets :
30 exclusive country reports from Horwath HTL

Next year's IT challenges :
What will they be? How much will they cost?

Legal issues facing us in Europe, China and the USA

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ECOLE HÔTELIÈRE DE LAUSANNE

The Ecole hôtelière de Lausanne (EHL) is the co-publisher of The Hotel Yearbook. As the oldest Hotel School in the world, EHL provides university education to students with talent and ambition, who are aiming for careers at the forefront of the international hospitality industry. Dedicated to preparing tomorrow's executives to the highest possible level, EHL regularly adapts the contents of its three academic programs to reflect the latest technologies and trends in the marketplace. Since its founding in 1893, the Ecole hôtelière de Lausanne has developed more than 25'000 executives for the hospitality industry, providing it today with an invaluable network of contacts for all the members of the EHL community. Some 1'800 students from over 90 different countries are currently enjoying the unique and enriching environment of the Ecole hôtelière de Lausanne.



HORWATH HTL

Horwath Hotel, Tourism and Leisure consulting are the world's number one hospitality consulting organisation, operating since 1915. Horwath HTL are the industry choice; a global network offering complete solutions in markets both local and international. Through involvement in thousands of projects over many years, Horwath HTL have amassed extensive, in-depth knowledge and understanding of the needs of hotel & real estate companies and financial institutions.

Horwath HTL are the world's largest consulting organisation specialised in the hospitality industry, with 50 offices in 39 countries. They are recognised as the pre-eminent specialist in Hotels, Tourism and Leisure, providing solutions through a combination of international experience and expert local knowledge.



HSYNDICATE

With an exclusive focus on global hospitality and tourism, Hsyndicate.org (the Hospitality Syndicate) provides electronic news publication, syndication and distribution on behalf of some 750 organizations in the hospitality vertical. Hsyndicate helps its members to reach highly targeted audience-segments in the exploding new-media landscape within hospitality. With the central idea 'ONE Industry, ONE Network', Hsyndicate merges historically fragmented industry intelligence into a single online information and knowledge resource serving the information-needs of targeted audience-groups throughout the hospitality, travel & tourism industries... serving professionals relying on Hsyndicate's specific and context-relevant intelligence delivered to them when they need it and how they need it.



CORNELL UNIVERSITY SCHOOL OF HOTEL ADMINISTRATION

Founded in 1922, Cornell University's School of Hotel Administration was the first collegiate program in hospitality management. Today it is regarded as one of the world's leaders in its field. The school's highly talented and motivated students learn from 60 full-time faculty members – all experts in their chosen disciplines, and all dedicated to teaching, research and service. Learning takes place in state-of-the-art classrooms, in the on-campus Statler hotel, and in varied industry settings around the world. The result: a supremely accomplished alumni group-corporate executives and entrepreneurs who advance the industry and share their wisdom and experience with our students and faculty.

London swings

THE 2012 OLYMPIC GAMES ARE GIVING LONDON THE IMPETUS TO COMPLETE A NUMBER OF HOTEL PROJECTS – WHICH IN TURN IS GIVING INTERIOR DESIGNERS THE OPPORTUNITY TO DEMONSTRATE THEIR CREATIVITY IN SOME INTERESTING NEW SPACES. **DEXTER MOREN**, DIRECTOR AT LONDON-BASED DESIGN PRACTICE **DEXTER MOREN ASSOCIATES**, SHARES HIS EXPECTATIONS FOR THE KEY DESIGN TRENDS HE SEES FOR THE YEAR AHEAD IN THIS DYNAMIC HOTEL MARKET.

London hotel development is undoubtedly one of the busiest single property markets in Europe, fuelled by the emergence of London as a global destination of choice for business, conference and leisure that maintains continued high rates and occupancy levels. Certainly the Olympics have provided momentum to complete projects by a certain time and has also focused development to the east of London, but no one builds hotels for one sporting event, and longer-term demand seems insatiable – all brands want to be in London or increase their provision in an otherwise difficult UK hotel market.

As such, in the year ahead we're going to see a broad range of new hotel interiors across a spectrum of brands and budgets, and I highlight what could be seen as the emergence of some new trends.

FOOD & BEVERAGE

Food & beverage design has always been an important component in boutique hotels and luxury brands. This year in London alone, we've seen several new openings sign up signature chefs such as Heston Blumenthal, Marcus Wearing, Wolfgang Puck and Nuno Mendes.

One of the most significant moves, however, has been the industry reverse, where restaurateurs have become hoteliers. Trevor Gulliver and Fergus Henderson of St.John's have opened a 15-room hotel in the heart of Leicester Square. Inspired by a similar concept in Beirut, they have extended their offering of «Nose-to-tail eating» to «From table to bed.» How soon before other successful restaurateurs join them?

INCLUSIVE DESIGN

Inclusive design has often been treated as an obstacle rather than an opportunity within hotel design. Many openly admit to the disappointment at being allocated an «inclusive» bedroom primarily because of its clinical bathroom. However, with the Olympics and Paralympics coming to London, now more than ever we have the opportunity to reconsider people's needs and design hotel spaces that work for all. Emphasis will be placed on attractive bathroom layouts with concealed fittings and built

in flexibility, clear navigation and considered lighting that doesn't look like it belongs in a hospital. My firm is currently working with InterContinental Hotel Group to develop a new model that will presage in an all inclusive wing of 50 bedrooms, due to open in Southwark ahead of the Paralympics.

TECHNOLOGY

One of the most rapidly changing aspects in hotel design is the use of technology, and how it is shaping the guest experience. My last international flight was booked and paid for on the internet, with boarding pass loaded directly to my mobile phone so that no paper ticket or even boarding pass was created. On my return to the UK, an Iris eye scan meant I didn't even need my passport. The implication for hotels is immense, as we all know that technology that may be prohibitively expensive or cumbersome today will be cheap and micro-sized within a very short timescale.

Self check-in at hotels is already rendering the reception desk obsolete, similarly to how it has all but replaced airport airline



London swings

desks, and it is already possible for that same mobile phone to unlock the bedroom you've booked, clock up consumption from the minibar, access your bill, or set your selected bedroom environment. While ultimately, technology allows guests more control over their experience, one of the key aspects that sets a hotel apart is service, and it will be important for designers

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and hoteliers to strike a balance with the expectation that this will differ dependent on service level. In all this, it mustn't be forgotten that there is nothing more frustrating than technology that is not intuitive, unmaintained or has malfunctioned.

SPACE UTILIZATION

London property values and constraints of existing buildings provide a unique design environment, unlike any other city. At one end of the market, there continues to be growth in new micro-room brands where bedrooms of between 7 and 12 m² take reference from shipping and airline cabins to provide comfortable sleeping arrangements with accoutrements of en-suite luxury. Pioneered by companies such as easyHotel, this sector is no longer just a budget offer, as referenced by brands such as Citizen M or Yotel. Ironically, the role for interior design in this market is probably the most challenging, with the need to create the illusion of acceptable guest experience within an area smaller than an average car parking space. This spatial optimization doesn't diminish across the spectrum of hotel room sizes, with even 5-star hotels squeezing brand standards. With notable exceptions, such as London's newly opened Corinthia and the proposed Shangri-la, in contrast to places like Dubai



where bedroom sizes tend to be brand standard plus 5-10 %, equivalent London hotels tend to be brand standard less 5-10 %. Given that essential components such as the bed, bath, shower, etc. cannot be diminished, the spatial planning skill of interior designers working in London need to be supreme.

DAYLIGHT

Meeting and conference space has seen the light in demand from customers for spaces that are not permanently closeted in blackness and artificial light. While there always remains the need to be able to create a dark environment, hotel reports of strong customer preference for meeting and conference space to be able to provide natural light is illuminating. While views are not always achievable in an urban context, new hotels such as DMA's Hilton Bankside propose ingenious scoops to draw light into basement space.

ROOFTOP BARS

When I started designing hotels, no self-respecting hotelier would let a designer even suggest rooftop food & beverage, citing Hilton Park Lane as the exception that proved the rule. Increasingly, the rooftop bar is firmly ensconced as a «must have» in both conversion and new-build hotels, as we discover the joys of pie in the sky!

London swings



SUSTAINABILITY

Finally, sustainability continues to remain a pertinent issue in the hotel world, with continually evolving techniques and technologies both to satisfy client sensibility and offset dramatic energy cost rises. Approaches have moved a long way from polite notices to re-use bath towels – however, there is still a long way to go.

Is it the recession blues or sustainability sensibility that is making recycling the new black in interior design? Re-used found artefacts, sometimes left as discovered, sometimes

refinished or re-upholstered, but never enough not to look reclaimed, are appearing in more frequency. In parallel with the sumptuous and traditional new interiors of The Savoy and Corinthia, we're also seeing an increase in the trend to leave environments as found, with exposed concrete being as fashionable as sand-blasted brick was a decade ago. My firm is currently developing a new hotel brand at Tobacco Dock that will feature loft style, pared down, simple, unostentatious interiors, as referenced in the US Nylo brand or the Gastwerk in Hamburg. ■

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do not disturb.
I'm cleaning.



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AND WORKLOAD IN YOUR
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AND KILL BACTERIA.

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